



INTEGRATED TERTIARY SOFTWARE

Operational Aspects of the ITS System

(OPS)

User Manual

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OPS - Operational Aspects of ITS Systems

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1. INTRODUCTION

The ITS systems are on-line systems, i.e. users interact directly with the database. Information is input and updated directly into the database by authorised users via the keyboard and mouse and may be viewed (“queried”) at any time by authorised users on the terminal screens.

Much of the paper flow and procedures which were essential in the past to ensure control and correctness of batch processing, has now become unnecessary since information can often be captured at the point of origin, and immediately verified on the screen by the person who entered it into the system.

It is, therefore, essential that every user is thoroughly familiar and at ease with the use of his/her PC, which is the primary interface to the information in the database.

The systems are menu-driven and user-friendly, i.e. after a user has logged into the system she/he will navigate through the system by selecting menu options and will be guided continuously by instructions and help-messages on the screen.

In this document important information is provided concerning basic keyboard handling and terminology, notational conventions used in ITS User Manuals and the retrieval of information from the database.

2. FUNCTIONALITY

In this section the general functionality of the web-based version of the ITS systems are discussed:

2.1. BROWSER

Access to the ITS system can be with any browser through the Intranet or Internet . Examples of well known browsers are Internet Explorer, Netscape, etc.

2.2. WINDOWS FUNCTIONALITY

Full Windows functionalities are available, such as cut and paste, drop and drag, etc. The keyboard and the mouse can be used for navigation when working in the menus and options.

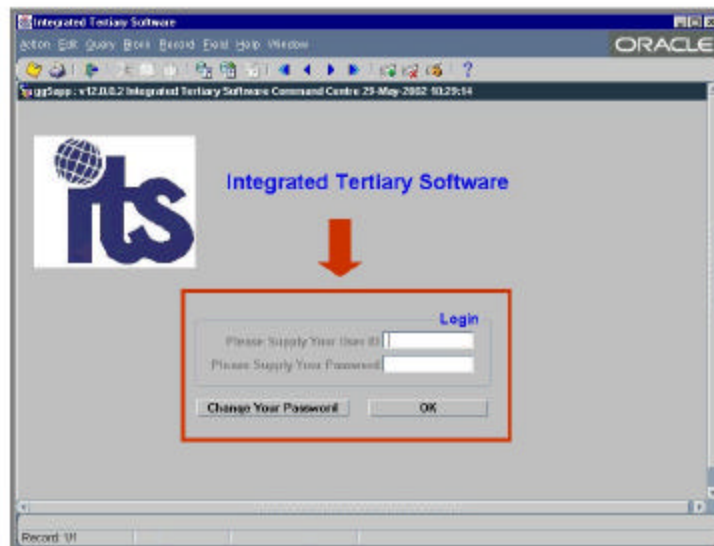
2.3. SYSTEM SETTINGS

The system is made available to clients with standard settings. An example of how this can be used effectively is by assigning different background colours to the production and test machine at an institution. It is, however, important to remember that the settings are global per Oracle instance, which implies that the different users cannot set their own colour schemes, this will be done globally.

3. LOGGING ON

When logging onto the ITS system, the following steps must be followed:

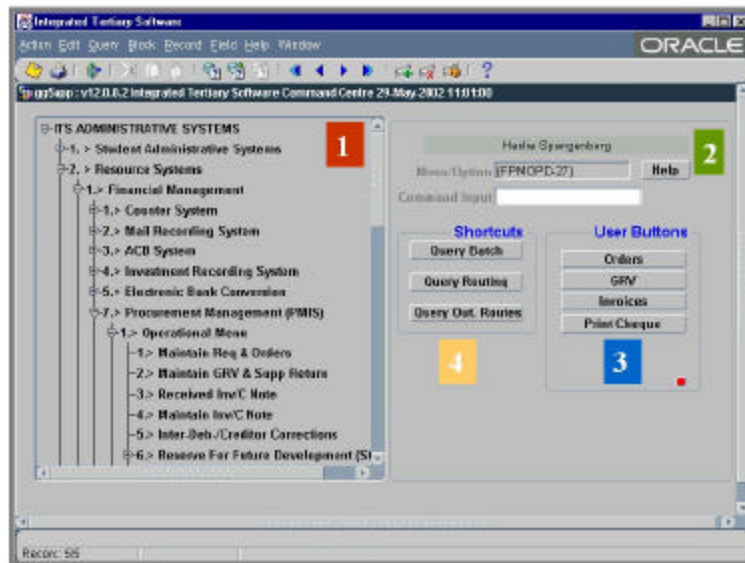
- | | |
|---------------|---|
| <i>Step 1</i> | You must have access to a browser (e.g. Netscape or Internet Explorer) |
| <i>Step 2</i> | Using your browser, go to the IP address as relevant for your institution |
| <i>Step 3</i> | You will be prompted for an user identification and password. |



The user ID and password are set up in {USERS-5} and maintained by the institution. It is important to remember that you can only be logged in once, simultaneously with the same user ID. If you need to have more than one active session at once, more than one user ID must be used.

4. MENU STRUCTURE

Below is an example of an ITS menu. For information on the display and usage of the menu, refer to the following points:



4.1. TREE STRUCTURE

The display of the menu is in a tree structure. The user can navigate with the mouse by <clicking> on the menu name and options. The structure can be expanded to option level and collapsed back to menu level.

4.1.1. Menu signs

In front of the name of each option, different signs can be seen. The following signs in front of the option number are relevant to menus and indicate the following:

<i>Signs</i>	<i>Meaning</i>
-	Expanded menu
+	One level menu

4.1.2. Option signs

In front of the name of each option, different signs can be seen. The following signs in front of the option number are relevant to options and indicates the following:

<i>Sign</i>	<i>Meaning</i>
>	a user can insert and update the data in that option, if that particular program allows updates
<	a user has select-only access i.e. data may be queried but not updated
+	indicates a sub-menu. When access is given the user only needs access to options, and not menus. Therefore access to a reports menu, from a main menu, e.g.; {SREG-80} is not necessary.
#	a user has no access to the option. If a user selects an option for which s/he has no access, the system will display the message "INSUFFICIENT PRIVILEGES" and re-display the menu.

4.1.3. Access to options

Should a user select a menu to which s/he has no access, the menu will be displayed, but every option will be barred with "#" signs. The access for each user is institution defined and maintained in the menu "USERS" and discussed in detail in the manual General System.

4.2. USER AND MENU DETAIL

In the top right hand corner of the menu, the following details are displayed:

- *User name*

The description of the user name is taken from {USERS-5}. The detail from the "Name" field is displayed.

- *Menu/Option*

The presently selected menu name and option are displayed here.

- *Command input*

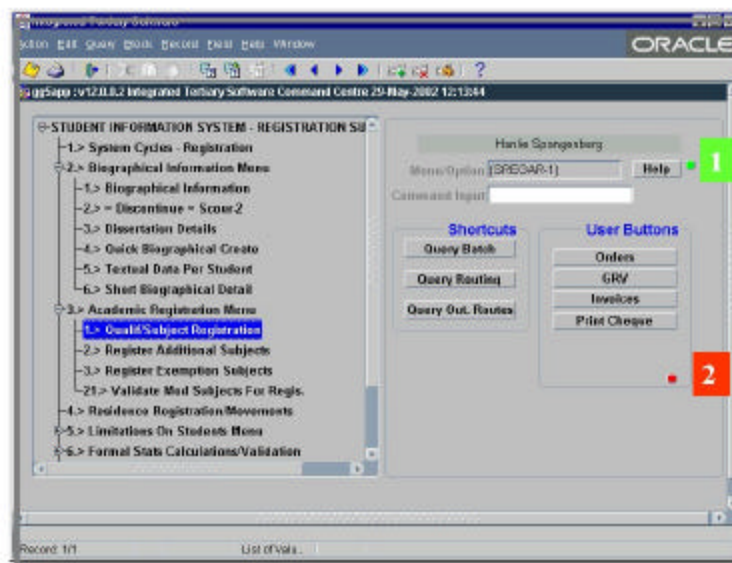
The menu name or option number can be typed into this field. The combination of menu name and option number cannot be used in one command.

4.3. USER BUTTONS

The user can set up a list of six preferred options, logically options that are used often by the user. The options can then be selected from the user buttons, and the user does not need to go to the tree structure on the left-hand side to select the option. This list is maintained by the individual user and options can be added and changed as often as required.

4.3.1. How to add buttons

- Highlight the menu option in the tree structure, but do not <double click> to go into the option.
- <Click> on the green button (1) next to the “Help” button (see below)
- The option will be added to the list of “User Buttons”.



4.3.2. How to change or delete user buttons

- <Click> on the red button (2) in the “User Buttons” frame (see above)
- a new option will be displayed with the heading “Custom Buttons”
- if you want to change the description of your button, change the “Button Label” in this screen
- if you want to delete the button, use “Remove Record” either from your toolbar, from the icon or use a shortcut key. The sequence of the buttons can be changed by updating the “Button Number” field.
- Updating the “Tooltip” field can also change the tooltip that is displayed when you move your mouse over a button.

4.4. SHORT CUTS

The following shortcuts are system defined on this menu:

4.4.1. Query Batch

4.4.1.1. General

All jobs that were run in immediate or deferred batch when the report was run online, can be queried with this button. If you <click> on this button, you will be taken to a screen where all your valid batch jobs are displayed. In this screen you can see whether the job has been successfully completed or if it failed, batch jobs can also be printed and cancelled via this screen. Below is a short discussion on the functionality of batch. The technical functioning of this facility is discussed in more detail in the General System Manual. This section merely deals with those aspects that are of concern to users of the facility.

The ITS System allows the running of reports online or in immediate / deferred batch. Immediate batch means that the program is immediately started and run directly in background, the user's session is freed. Deferred Batch means that the program will be started at a later stage (probably overnight) as determined by the data processing section.

The user's terminal will be freed to continue with other work. Furthermore, the running of complex reports in deferred batch overnight has the benefit of not affecting the response times of other users of the system during daytime. Some reports on the systems, such as most of the SAPSE report programs, can only be run in batch. When they are requested, the user will not have the "RUN" option when the report is executed. The user only has a "Batch" button to run the report. This will give the user the option to run the report in batch. Any user will, however, only be able to see or print reports that were requested under his or her login id.

4.4.1.2. Monitoring, Printing and Cancelling Batch Jobs

To establish if a request has been processed, or to (re)print a copy of a report that has been processed, the user can <click> on the "Query Batch" button. The system will do an automatic query on all existing batch jobs of this user, and will display the following:

- report or job description
- request number and queue code
- date and time requested
- date and time completed (if completed)
- date and time cancelled (if cancelled)

- Success/Fail (If a job has been successfully completed, this field will contain a “0”, but if the job was terminated for some technical reason, it will contain a “1”).

Only the following two fields can be updated by the user:

- PRINT

If a (Y)es is entered in this field in respect of a completed request,

- CANCEL

If a (Y)es is entered here in respect of a request that has not yet been started, the request will be cancelled and the date and time will be recorded in the appropriate fields.

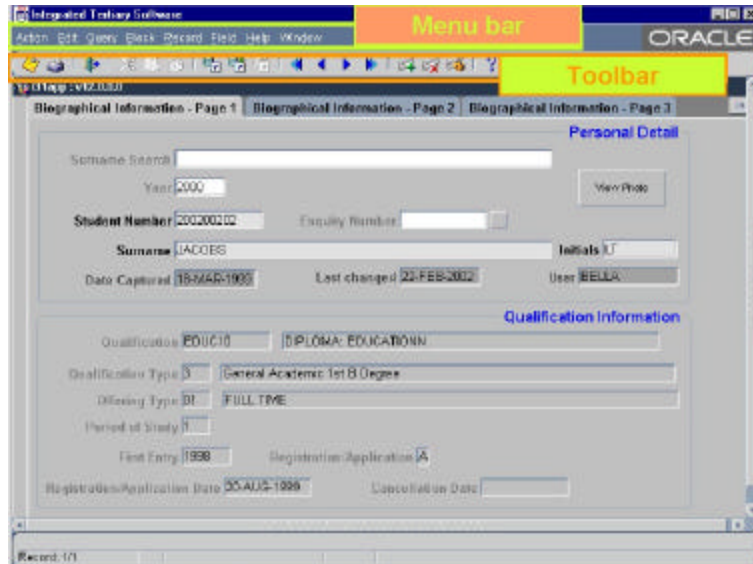
4.4.2. Query Routing

Neem uit Melanie se Routing manual

4.4.3. Query Out Routes

Neem uit Melanie se Routing manual

5. BUTTONS AND BARS



5.1. MENU BAR

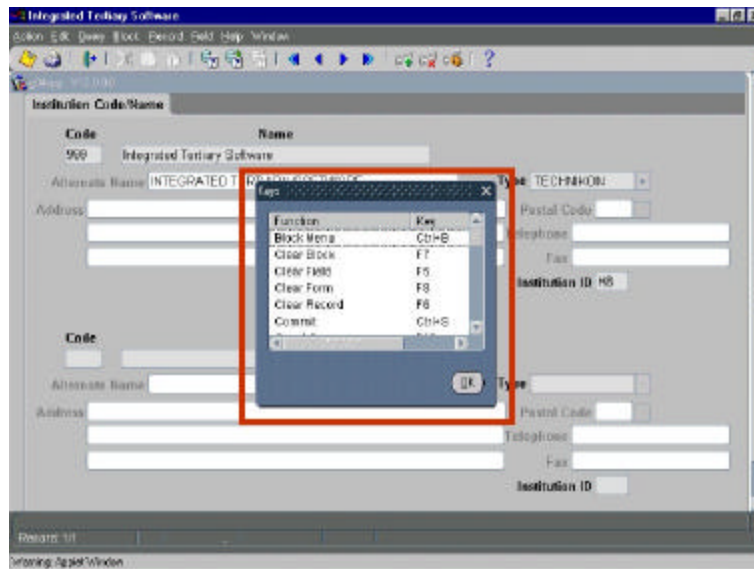
The menu bar is a special toolbar at the top of the screen, which contains menus such as File, Edit, and View. A menu displays a list of Oracle and Windows commands such as needed to operate the ITS system.

5.2. TOOLBAR

The toolbars consist of icons representing the actions on the menu bar. The toolbar is an easy way to find and use the Oracle and Windows command when operating the system. Unlike a standard Windows environment, the toolbar cannot be customised.

5.3. SHORTCUT KEYS

The user can use shortcut keys via keyboard action as an alternative to the menu bar or toolbar. The shortcut keys can be obtained by pressing <ctrl + k>, refer to the example below.



Following is a list of the standard shortcut keys that can be used:

FUNCTION	KEY	FUNCTION	KEY
Block Menu	Ctrl+B	List of Values	Ctrl+L
Clear Block	F7	List Tab Pages	F2
Clear Field	F5	Next Field	Tab
Clear Form	F8	Next Primary Key	Shift+F7
Clear Record	F6	Next Record	Down
Commit	Ctrl+S	Next Set of Records	Shift+F8
Count Query	F12	Previous Field	Shift+Tab
Delete Record	Ctrl+Up	Previous Record	Up
Display Error	Shift+Ctrl+E	Print	Ctrl+P
Down	Down	Return	Return
Duplicate Field	Shift+F6	Scroll Down	Page Down
Duplicate Record	Shift+F6	Scroll Up	Page Up
Edit	Ctrl+E	Show Keys	Ctrl+K
Enter Query	F11	Up	Up
Execute Query	Ctrl+F11	Update Record	Ctrl+U
Insert Record	Ctrl+Down	Exit	F4

6. NAVIGATION

Navigation in the system can be done with the mouse or the keyboard. Navigation is relevant in two ways:

- Menu navigation
- Option navigation

6.1. MENU NAVIGATION

To move between menu options the user has three options:

6.1.1. Via the Numeric Codes on the Menus

Select the appropriate number from the menu, enter it either via the numeric keyboard on the right-hand side of the keyboard, or via the numeric keys above the alpha keys. Type the number of the menu you want to go to in the “Command Input” field, and follow it by pressing <RETURN>.

6.1.2. Directly via Menu codes

It is possible to go directly and rapidly from one menu to any other, without having to go through higher level menus, by typing in “/menu code” rather than the number, followed by a <RETURN>. If for example “/SREG” or “/sreg” is entered, the user will be taken to the registration subsystem menu in the Student System.

If only a “/” is entered, the user will be returned to his/her first menu.

6.1.3. Via the tree structure

The user can also use the tree structure on the left side of the screen to navigate to menus and eventually options. The structure can be expanded or collapsed as required.

6.2. OPTION NAVIGATION

6.2.1. Fields

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The character of the field can be seen by the colour of the field and the colour of the field name. Following are guidelines on how to understand the fields you see. Refer to the screen print below for example fields:

Type of field	Field colour	Field name colour	Example field
Mandatory	Light grey	Black	Student number
Non mandatory	White	Light grey	Enquiry number
Query only	Dark grey	Dark grey	Date captured
Display only	Light grey	Medium grey	Qualification

The screenshot shows a software window titled "Integrated Testbed Software" with a menu bar (Action, Edit, Query, Block, Record, Field, Help, Window) and a toolbar. Below the toolbar, there are three tabs labeled "Biographical Information - Page 1", "Biographical Information - Page 2", and "Biographical Information - Page 3". The active page is "Page 1". The form contains several input fields and sections:

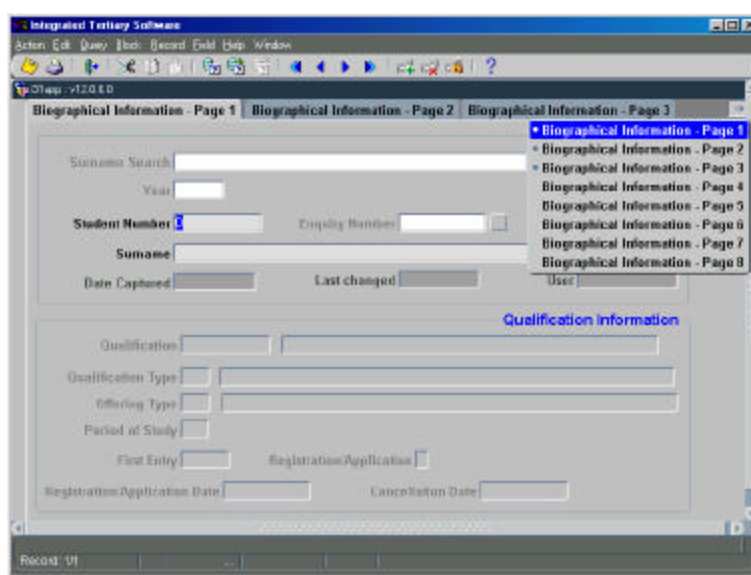
- Personal Detail** (Section Header):
 - Surname Search: [Text Field]
 - Year: [Text Field] (Value: 2100)
 - View Photo: [Button]
 - Student Number: [Text Field]
 - Enquiry Number: [Text Field]
 - Surname: [Text Field]
 - Initials: [Text Field]
 - Date Captured: [Text Field]
 - Last changed: [Text Field]
 - User: [Text Field]
- Qualification Information** (Section Header):
 - Qualification: [Text Field]
 - Qualification Type: [Text Field]
 - Offering Type: [Text Field]
 - Period of Study: [Text Field]
 - First Entry: [Text Field]
 - Registration/Application: [Text Field]
 - Registration/Application Date: [Text Field]
 - Cancellation Date: [Text Field]

At the bottom of the window, there is a status bar with the text "Record: 1/1" and "Warning: Apple Window".

6.2.2. Pages

Multiple pages per block can be seen as tabs at the top of the screen. Additional pages can be reached by using the arrow button on the right hand side of the bar.

See for yourself in : {SREGB-1}



6.2.3. Blocks

Each block can be seen as a separate tab at the top of the page. When on the first block, the user can not see the tabs for the following blocks. The <NEXT BLOCK> key will take the user to the next block. The user can also see a list of the blocks applicable to the present option by pressing <CTRL + B>. The user can then move directly to the relevant block from this facility.

See for yourself in: {PBOP-1}

6.2.4. Buttons

The ITS system makes use of the following buttons:

<i>Type of button</i>	<i>What does it look like</i>	<i>Where</i>
Radio buttons	Used where one of two options have to be selected	If the field selection can be one of two options, e.g.: male or female
Combo box	A square button with a down arrow in the button. The user must <TAB> past a combo box, the <ENTER> key will not be functional	A fixed list of values as predefined, e.g.: CESM categories
List of values	A square blank button	To select from a list of codes / values as defined in the institutions structure, e.g.; departmental codes

See for yourself in: {SREGB-1} The Gender field is a radio button
The Preferred language field is a drop down list
The Student type field is a list of values

6.3. MOUSE NAVIGATION

The user can move in the option by using the mouse, the <TAB> key or the <ENTER> key. However, there are fields where mouse navigation is not allowed because of the sequence in which fields must be entered. If the mouse cannot be used in a specific option, this is indicated by a red line on the left-hand side of the screen. The user can see this when in the option. In an option like this the user must use the <TAB> or <ENTER> key to navigate to the next fields.

See for yourself in: {FPMO-1}

7. BASIC TERMINOLOGY

Three terms are used regularly throughout ITS and Oracle User Manuals, and users should be familiar with their meaning. These terms are “FIELD”, “RECORD” and “BLOCK”.

* A “FIELD” is a place where a single piece of information is entered into the database, e.g. the surname of a person.

Navigation key: <enter> key
 <tab> key
 mouse

* A “RECORD” is a group of fields that belong together, and are usually entered together, for example all the personal details of an individual. If a record does not contain many fields, for example simple code structures, up to seventeen records may be displayed simultaneously on one screen. Sometimes, however, a record contains so many fields that only one record can be shown on an input screen, or it may stretch across more than one screen, e.g. the biographical record of a person.

Navigation key: <down arrow> key

* A “BLOCK” is a portion of a screen where identical records are entered, for example, the personal details of a student will be entered into one block, and the subjects for which he is registered into another. Some screens contain several blocks, and others contain one block only. Some blocks are so large that they extend over several screens.

Navigation key : <shift + page down>

8. NOTATIONAL CONVENTIONS

It is essential that every user of the ITS systems be familiar with the conventions used to describe data fields, screen locations, etc.

8.1. DATA FIELD

Whenever a particular data field on one of the screens is discussed in any manual, the following convention is used:

The type of field is indicated as either

- numeric (N) or
- alpha-numeric (A),
- followed by the length of the field.

Example:

The student number field will be (N7), indicating that it consists of a seven-digit number, and the surname field will be (A30), indicating that it is a 30-character alpha-numeric field.

Where decimal numbers are allowed, this is indicated by a full stop in the number and the length of the decimal indicated after the full stop.

Example : e.g. as (N15.2), which allows numbers up to 99999999999999.99 to be entered.

8.2. MENU AND OPTION REFERENCE

The menu code and an option number in braces identify any particular screen in the system. For instance, {SREGAR-1} refers to option 1 on the Academic Registration Menu of the Student System. This option allows access to the Oracle screen for normal registrations.

Some menu options provide access to more than one block of information. If this is the case, a particular block is indicated by a “b” followed by a block number, e.g. {SREGB-1b2} would indicate the second block under menu option {SREGB-1}.

Some blocks extend over more than one screen. If this is the case, a particular screen (or “page”) is indicated by a “p” followed by a page number, e.g. {SREGB-1b1p2} would indicate the second screen of block {SREGB-1b1}.

8.3. DATE FORMAT

The standard date format used in all input screens is “DD-MON-YYYY”, e.g. “12-MAY-2003”. The month is always entered as the first three letters of the *English* month name. In the rare instances where a non-standard date format is used, this will be clearly indicated.

8.4. LETTER CASE

In some data fields in the systems, lower case alphabetic characters are automatically converted to upper case. *In other cases, like surnames, first names and titles, however, the systems will accept lower case characters as well.* This allows class lists and personnel lists to be printed in both upper and lower case characters. It is essential, however, that such information should be entered in a consistent manner to ensure a consistent look on reports. *A decision in this regard should be made before take-on of biographical information commences.*

9. ENTERING INFORMATION INTO THE DATABASE

Information is entered into the database for three reasons:

- a new record must be created (“inserted”),
- an existing record must be changed (“updated”), or
- an existing record must be removed entirely (“deleted”).

9.1. CREATING A NEW RECORD

Via the appropriate menu option the user will be presented with a blank screen containing the fields into which information must be inserted, each field being preceded by a short description of its contents. A “cursor” (i.e. a blinking line or oblong marker) will be positioned at the first field into which information may be entered.

The appropriate information is now typed into the first field, and <ENTER>, the mouse or <TAB> is used to position the cursor in the next field, which is then completed. This process continues until all fields for this record have been completed, which could cover more than one screen depending on the record length.

Information on the screen, as above, has not yet been written into the database, but exists merely in the memory of the computer. To enter the record into the database, the <COMMIT> key must be pressed, after which the message: “Working....” will be displayed at the bottom of the screen for a short while, followed by the message “Transaction complete: N records applied and saved”, where N is the number of records that were actually written away into the database.

The user is not forced to commit after each record, but if a record covers an entire screen or more, it is recommended that the information be written away to the database before the next record is created.

Throughout the process of data entry, the system will check wherever possible that only valid information is entered, e.g. if a subject code is entered that has not yet been defined in the database, the system will provide an error message to that effect, and will not allow this code to be used. In this instance the subject must first be defined in the appropriate part of the system before the code may be used. The system will not allow the creation of duplicate records, providing messages such as: “Row has already been inserted”, “Duplicate value in index” or “Unique key constraint violated” if it detects such an error.

9.1.1. Creating Records That Are Nearly Similar

It often happens that several records have to be created which are similar in most respects. Typical examples are timetable records where the timetable information for a particular lecturer is being entered for an entire week, subject records for different offering types, etc.

Whenever this situation arises, the following procedure should be used:

1. Create the first record
2. Create a new, blank record using the <INSERT RECORD> command
3. Use the <DUPLICATE RECORD> command to copy the previous record into the blank record
4. Make the desired changes
5. Repeat steps 2. to 4. as often as necessary, not forgetting to <COMMIT> at regular intervals!

9.2. UPDATING AN EXISTING RECORD

Before an existing record can be changed, the record must first be retrieved from the database by “Executing a Specific Query”. For more information on this refer to the section on “Retrieving information from the database” in this manual.

Once the record is on screen, the necessary change(s) are made in the applicable fields and the record is <COMMIT>ted.

9.3. DELETING A RECORD

The <DELETE RECORD> command is used for this purpose, followed by a <COMMIT>.

The system will often not allow a record to be deleted unless certain preconditions have been met. An example of this can be found in the Space Inventory system where a room cannot be deleted if assets are still allocated to the room.

10. RETRIEVING INFORMATION FROM THE DATABASE

Apart from the “traditional” way of retrieving information from the database by requesting, every user of the ITS systems can execute queries from his/her terminal which will allow many ad hoc queries to be answered promptly, without requiring the involvement of the IT Department or, in fact, the production of printed reports.

Some examples of common queries are presented below. Queries of a more complex nature can also be handled - consult the Oracle manuals or your technical personnel for guidance in this respect.

10.1. THE GENERAL QUERY

- To retrieve all records in a particular block, press the <EXECUTE QUERY> key. The cursor will be positioned at the first record, and the rest may be reached by using the <NEXT RECORD> key.
- To count the number of records in the block, use the <COUNT QUERY HITS> command. If you then use the <EXECUTE QUERY> key, it will retrieve the records that were counted with the previous action.

10.2. THE SPECIFIC QUERY

In most cases the need is for more specific information retrieval, in which case the following procedure is followed:

- press the <ENTER QUERY> key
- move the cursor to the field to be queried
- type the desired value in the applicable field, e.g. student number,
- move on to any other fields that may also be required for the query, and type in the desired values
- when the complete query has been entered, use <COUNT QUERY HITS> if a record count is desired,
- else press the <EXECUTE QUERY> key to retrieve all the entries in this block which conform to these criteria.

10.3. THE “%” (PERCENTAGE) QUERY

To find all subjects which include the characters “ACCOUNT”:

- Press <ENTER QUERY>
- Move the cursor to the subject field
- Type in %ACCOUNT%
- Press <EXECUTE QUERY>.

The first record will be displayed, and the rest can be viewed one after another using <NEXT RECORD>.

The % sign acts as a so-called “wildcard”. The specification %BERG will select only those surnames ending in “BERG”, whereas BERG% will select all the surnames starting with “BERG”.

10.4. QUERY USING VARIABLES

All the students with student numbers between 20021000 and 20022000, can be selected as follows:

1. Press <ENTER QUERY>
2. Move the cursor to the “student number” field
3. Type & in the field
4. Press or click <EXECUTE QUERY>, (or <COUNT QUERY HITS> if you wish to count the number of students in the range), whereupon the message “Query Where Criteria” will appear in a “pop-up” query window in the centre of the screen, with a blinking cursor in a highlighted block
5. Type & between 20021000 and 20022000
6. Press <COMMIT> to view the first record which satisfies the criteria (or to get the count)
7. Use <NEXT RECORD> to reach any other records in the range.

Queries using the SQL-operators “like”, “<”, “>”, “is”, “is not”, “in”, “not in”, etc., can also be executed readily.

The queries “& is null” and “& is not null” are extremely powerful, and can be used very effectively in counting and/or retrieving those records in a block where information is missing in a particular field or combination of fields.

To execute a query using multiple variables, a colon (:) followed by one or more characters specifies each variable. The variables must be entered in each relevant field.

E.g., suppose that we enter the variables :pn, :s, :t and :jd in a person's biographical record as follows:

:pn in the Personnel Number field
:s in the Surname field
:t in the Title field
:jd in the Job Designation field

The query

:pn between 0 and 1000 and :t = 'PROF' and :jd like 'RES%' order by :s

will retrieve the records for all Professors with personnel numbers smaller than 1000, with a Job Designation starting with “RES” in alphabetical sequence by surname.

The query :pn > 1000 or :s like '%BERG%'

will retrieve in numerical sequence all records with personnel number > 1000 and surnames containing the character string “BERG”.

The query :pn < 10000

will display all records with personnel number < 10000

The query :jd4 not like 'LEC%'

will display all records for people where the Job Designation does not start with “LEC”.

10.5. THE “ORDER BY” QUERY

When a query is executed and no ordering sequence is explicitly specified, the records will be displayed sequentially by the so-called primary key of the record, which would typically be a personnel number, student number, etc. It is sometimes useful to sort a series of records into a different sequence, e.g. we wish to display all personnel records of a given Appointment Type (say 21) in alphabetical sequence by surname. This query would be executed as follows:

1. Press <ENTER QUERY>
2. Move the cursor to the “Surname” field, and enter & (or a variable e.g. :s)
3. Move cursor to “Appointment Type” field and enter 21
4. <EXECUTE QUERY>, whereupon the query window will pop-up
5. Type Order by & (or :s if :s was entered)
6. Press <COMMIT> to view the first record, and <NEXT RECORD> repeatedly to view the rest.

The command “Order by & desc” will retrieve the records in descending alphabetical sequence, i.e. “Z”, “Y”, “X”, etc.

10.6. THE “_” (UNDERSCORE) QUERY

To view all subjects with codes that start with “M” and end in “1”, one would:

1. Press <ENTER QUERY>
2. Move to the Subject Code field
3. Type in M, then five underscores, then 1
4. Press or click <EXECUTE QUERY> to view the records, or
5. Use <COUNT QUERY HITS> to count the number of records.

Note that the underscore replaces a character and can be used whenever a query needs to be done with known values in specific positions.

10.7. DATE QUERIES

For example, suppose we want to discover which staff members were employed since 1st January 1980 when new pension rules became mandatory, i.e. we want to compare appointment dates to '01-JAN-1980':

1. Press <ENTER QUERY>
2. Move the cursor to the “Appointment Date” field, and enter &
3. Press or click <EXECUTE QUERY>, whereupon the query window will pop-up
4. Type & >= to_date('01-JAN-1980', 'DD-MON-YYYY') (Note the single quotes)
5. Press <COMMIT> to view the first record, and <NEXT RECORD> repeatedly to view the rest.

To see the oldest appointment first, add a space and order by & after the date; to see the latest appointment first, add order by & desc. Furthermore, we could select all appointments between, say, 1st January 1980 and 31st December 1982 by typing & between to_date('01-JAN-1980', 'DD-MON-YYYY') and to_date('31-DEC-1982', 'DD-MON-YYYY'), again ordering them from old to new or vice versa if we wished. (Note the two sets of single quotes).

11. HELP FACILITIES

Help is provided in the ITS system in various formats. These are discussed below:

11.1. HELP PER FIELD

A single line of detail on each field in the systems is available to the user by simply pressing the <HELP> key when the cursor is at the particular field in the input screen. The message will appear at the bottom of the screen, and will provide more detail on the particular field and its permissible values. The length of the field and its type, i.e. numeric (N) or alpha-numeric (A), will also appear in the format eg: N30.

Shortcut key : <Ctrl + H>

By pressing the <HELP> key a second time, the user sees a full screen of technical detail on the field. The user can easily see whether the field is mandatory (i.e. must be entered), etc. <CLICK> on “OK” to return to the menu.

11.2. TOOLTIP

When the mouse is moved over the field, a small window is displayed underneath the field with a condensed help for the field. This tip will also indicate to the user the length of the field and its type, i.e. numeric (N) or alpha-numeric (A), will also appear in the format e.g.: N30.

Shortcut key : move mouse over field

11.3. ON-LINE HELP

The ITS manuals are available as on-line help. The online help can be selected and displayed per option. The option for which help is required should be highlighted. The user can then <CLICK> on the “HELP” button next to the “Menu/Option” field or on the question mark icon in the icon bar. A new window will be opened with help on the selected option. Please note that on-line help on a menu option is available even though you may not have access to that menu option.

To obtain the help, the user can also type in the “Command Input” field an “h” and the number of the option that help is required on. To do this, the user must be on the relevant menu where help is required. E.g.: on the menu {SREGB} the user can see biographical information help by typing <h1> in the “Command Input” field.

Shortcut key : <CLICK> on  or the  button or <CTRL+H> or “H+option number”

11.4. LIST OF VALUES

The <LIST OF VALUES (ILOV)> command can be used to display the allowed values for a field. This facility is usually available on fields where there is a fixed list of codes as defined by the institution, which are allowable values in the field. The user would not normally know all the allowable values and can use the <LOV> to select the required value.

When the <LIST> key is pressed, a pop-up window appears on the screen, with a heading explaining which information is displayed below. The cursor will be positioned on the first of the values, and can be moved with the <NEXT RECORD>, <PREVIOUS RECORD>, <SCROLL DOWN> and <SCROLL UP> commands to find the required code. When the user <ENTER>, the system will insert this value into the data field on the Oracle screen, and return to the screen.

The above method is fine for short lists of values, but can be time consuming and frustrating if the list is very long, e.g. a list of departmental codes. To assist the user in such cases, the <FIND> facility in the list can be used to search according to codes or description displayed in the list.

Shortcut key : <CTRL + L> or <CLICK> on grey button next to field

11.5. DRILL DOWN

The drill down facility enables the user to access other relevant options without exiting from the present option. An example of this would be if the user wants to link a new creditor to a creditor type in the menu {FPMM-2}. A creditor type for the new creditor does not already exist. Next to the field for “Creditor Type” a small red button represents the drill down facility. If the user <CLICK> on this button, the option to create creditor types is displayed. The creditor type can be created and on exit the user is back in the original option. The new creditor type can now be linked to the creditor and the user can continue to create the record.

Shortcut key : <CLICK> on red button next to field

12. REPORTS

All reports run through the ITS system will be one of the following two types:

- RDF reports
- C/SQL reports

The user can see the type of report in the heading when the report is run. The program name display, with an indication of the type of report in the suffix of the program name. E.g.; Report parameters for /disk1/its/fin/f7accc.pc .

All reports are generated on-line through batch processing. This must not be confused with the running of the reports in immediate or deferred batch. Reports can be re-generated using different selection criteria without having to revert back to the report menu. After the reports have been run, the user can tab to go to the selection criteria again, change on the criteria and run the report again. Using the tabs at the top of the screen can access the different pages of the report.

Reports can be saved directly on the PC after it has been run through the normal Windows functionality. The user can also print the report to any printer linked to the PC or to a system printer as defined in Unix.

12.1. TYPES OF REPORTS

12.1.1. RDF Reports

RDF reports can be generated in different formats and can be selected by the user:

- *PDF (Portable Document Format) is default format*
PDFs require Acrobat Reader to be displayed. Acrobat Reader resides on the client's PC and is subject to licence fees. This application will open automatically when the report is displayed. PDF is an image and cannot be changed, which implies that sections cannot be copied or cut from the report . However, the full PDF can be copied to another application.
- *Other Formats – Comma Delimited, HTML, HTML style Sheet, RTF and XML*
The other formats can be selected as desired by the user. The most commonly used are comma delimited reports that can be converted to Excel, Word, etc.

12.1.1.1. How to run an RDF report

- After the selection criteria has been completed, the user will be taken to the screen with the run, batch and exit options, as can be seen in the screen print above.

- If the run button is selected now, the report will be run as a pdf file and displayed in Adobe Reader.
- Alternatively the user can <click> on the red button next to the run button. This will take the user to the choose screen for the different formats.
- After a format has been chosen, the run button will reflect the format chosen, e.g.: Run (Delimited) .

12.1.1.2. How to print an RDF report

When an RDF is run, depending on the chosen format, the report will open in an application like Adobe Reader, Excel etc. From the application, the user can do a standard Windows print by choosing File and then Print. The output can then be sent to any printer that is linked to the PC.

12.1.2. C / SQL Reports

Acrobat Reader is not needed to view these reports. The content can be copied, cut, etc. directly from the report.

12.1.2.1. How to run a C / SQL report

- After the selection criteria have been completed, the user will be taken to the screen with the run, batch and exit options.
- To run the report, the user can <click> on the run button.
- Once the report has completed the “view” and “print” button will also be displayed on the same screen.
- The user can now view the report that will be displayed in a new Window.

12.1.2.2. How to print a C / SQL report

Reports can be printed either to a PC linked to the user's PC or to a system printer. Both options are discussed in detail below:

12.1.2.2.1. Print to system defined printer

After the report has been run, the “Print” button is added to the selection. This button enables the user to print to a system printer. The following steps must be followed:

- Step 1 : <click> on select “PRINT”
- Step 2 : select a printer with the “Choose One” button

A list of the valid printers as available on the system for this user will display. This is the list of printers, which are linked to the user in {USERS-5b2}

or type in the printer name in the “Printer Code” field

- Step 3 : select the “Print” button to sent the output to the printer

12.1.2.2.2.Print to a PC printer

When a C / SQL report is run, the report will open in an application like Internet Explorer or Netscape. From the application, the user can do a standard Windows print by choosing File and then Print. The output can then be sent to any printer that is linked to the PC. It is, however, important to remember that if the report is printed via the browser's print function all page break formatting is lost!

12.2. IMMEDIATE OR DEFERRED BATCH

A report can also be run in immediate or deferred batch directly while requesting a report. For more information on the functionality of batch, refer to the ITS General Systems Manual.

If a user wants to run a report in batch, the “BATCH” button can be selected after the report’s input criteria has been entered. The following steps must be followed:

- Select “Immediate” or “Deferred” and then select <NEXT>
- If a printer is required, select (Yes) and <CLICK> on “Select a printer”
 - The user’s list of allowed system linked printers will display and can be selected from
- If no printer is required at this stage, select (No) and then select <NEXT>
- If this request is dependent on another request, the number can be entered in “Dependant Request Number”. A list function is also available in the “Check it” button and then select <NEXT>
- The selection criteria for the batch job will display and the user can select “Proceed”
- A pop-up screen will display the request number. This number can be used for query purposes.

The batch jobs can now be monitored with the batch functionality available on the menu. For more information on this, refer to “Query Batch” in this manual.

12.3. PREVIOUS REQUEST

Each generated report is automatically allocated a unique request number. If this request number is used again, the selection criteria for the report, as it was when allocated, will be recalled. This enables the user to store frequently used input criteria and takes away the need to type it in every time the report is run. For consecutive runs the input criteria can be used as is, as recalled when the request number is entered, or changed for the new run of the report.

The request number can be entered in the first prompt of the report in the field “Previous Request”. A <list of values> is available on this field and will display the previous requests when the same user that is logged in ran this report.

12.4. LIST FUNCTION AVAILABLE ON SELECTION CRITERIA

In reports, all fields that are coloured in blue have a list available for selecting the input criteria. This list will display all the allowed values for this field; either as entered by the institution or as fixed in the system. The <list of values> can be reached by using the shortcut key or the menu bar. If the user knows the value, it can be typed in directly.